



## Demonstration

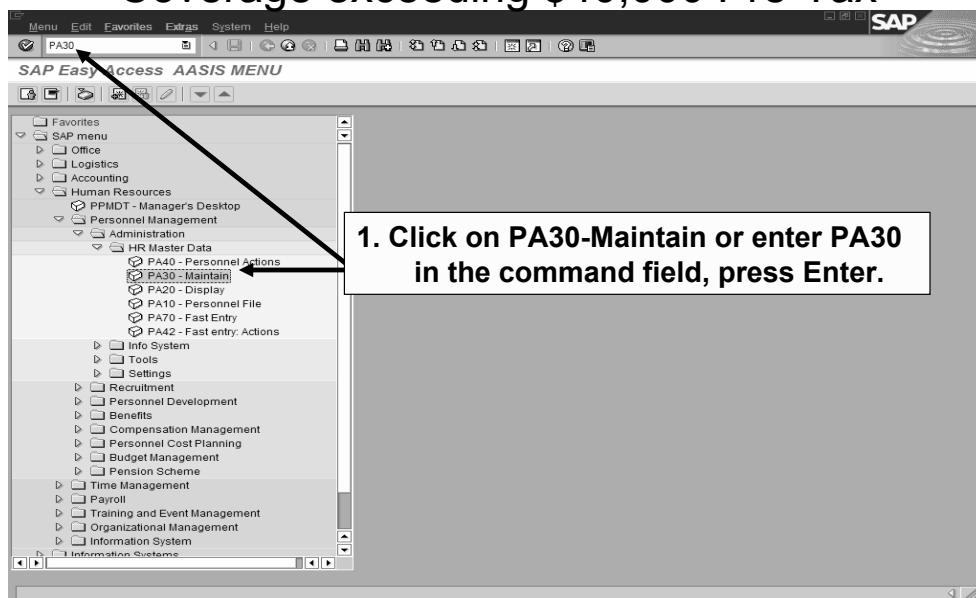
- Enrolling an Employee in the Post-tax Optional Life Plan and processing the insurance coverage that exceeds \$40,000 pre-tax

Human Resources > Personnel Management >  
Administration > HR Master Data > Maintain  
**(PA30/HRBEN0001/PA30)**





## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax





## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 1002  
Name Victoria Newman  
EE group 1 Regular State  
EE subgroup UE Employee Cost Center 627017 OFM BAA0100

Employment Issues Career Management **Benefits** Payroll Taxes

Infotype text  
General Benefits Information  
Family Member/Dependents  
Adjustment Reasons  
Health Plans  
Insurance Plans  
Savings Plans  
Flexible Spending Accounts  
Benefits Medical Information  
COBRA-Qualified Beneficiary

Period  
Fr. To  
Today Curr. week  
All Current month  
From curr. date Last week  
To current date Last month  
Curr. period Current Year  
Choose

Personal Data  
Addtl. Employee  
Employment Issu  
Career Managem  
Benefits  
Payroll  
Taxes  
Garnishments  
Time

Direct selection  
Infotype STy

**2. Enter the New Hire's personnel number**

**3. Use the left and right scroll buttons to select the Benefits tab.**



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

The screenshot shows the SAP HR Master Data maintenance interface. The top menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master Data'. Below this, the 'Personnel no.' is 1002, and the name is Newman. The 'Pers. area' is HL34, 'Department of Health', and 'Cost Center' is 627017. The 'Benefits' tab is selected, showing a list of benefit options: 'Infotype text', 'General Benefits Information', 'Family Member/Dependents', 'Adjustment Reasons', 'Health Plans', 'Insurance Plans', 'Savings Plans', 'Flexible Spending Accounts', 'Benefits Medical Information', and 'COBRA-Qualified Beneficiary'. The 'Adjustment Reasons' option is selected. To the right, the 'Period' section shows 'Fr.' and 'To' fields, with radio buttons for 'Today', 'A11', 'From curr. date', 'To current date', 'Curr. period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. Below this, the 'Direct selection' section shows 'Infotype' as 0378 and 'STy' as STy. Two callout boxes provide instructions: '5. Click Create' points to the 'Create' button in the top left, and '4. Select Adjustment Reasons or enter 0378 in the Infotype field' points to the 'Adjustment Reasons' option and the 'Infotype' field.



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

The screenshot shows the SAP HRBEN - Create Adjustment Reasons screen. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. The main area displays employee data for 'Victor1' (Status: Active, Department of Health). The 'Start' date is set to '01/01/2005'. The 'Adjustment Reason Data' section shows 'Benefit area' as 'State of Arkansas-US' and 'Adjustment reason' as 'Misc Benefit Changes'. Annotations with arrows point to specific fields: '8. Click Enter' points to the 'Enter' button; '6. \*Enter effective date' points to the 'Start' date field; '7. Select 'Misc. Benefit Changes' from the drop-down list.' points to the 'Adjustment reason' dropdown menu.

8. Click Enter

6. \*Enter effective date

7. Select 'Misc. Benefit Changes' from the drop-down list.

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5

\*The effective date will be the 1<sup>st</sup> day of that month for the change.

**Note:** During the nightly date recalculation program, the begin date will change to the appropriate pay period



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 1002 Name Victor1... Status Active

EE group 1 Regular State Em... Personnel ar HL34 Department of Health

EE subgroup UE Employee SSN 999-19-2506

Start 01/01/2005 to 12/31/9999

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason Misc Benefit Changes

Deviation from end date

Current end date: 12/31/9999

Calculated end date: 01/31/2005

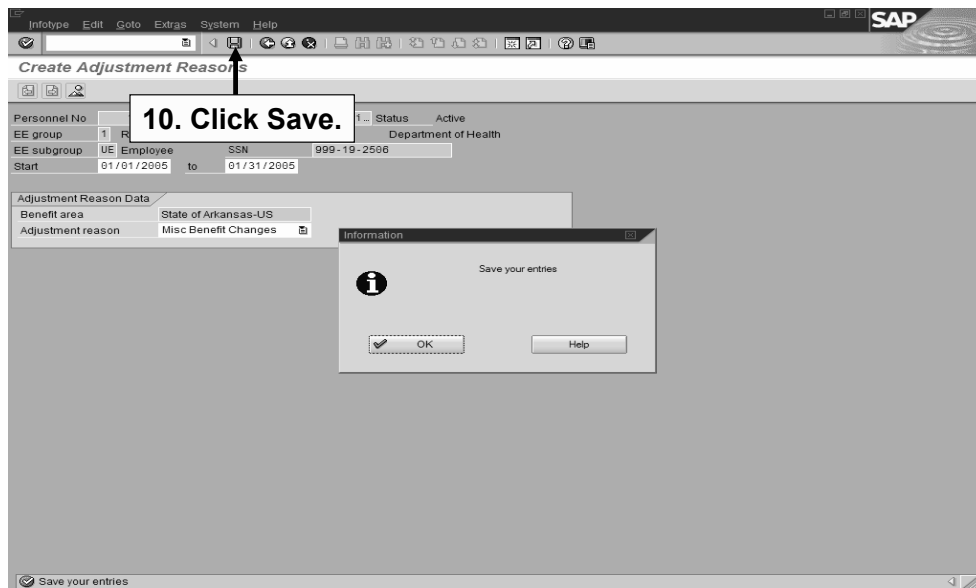
Do you want to replace the current end date with the calculated end date?

Yes No Cancel

9. Click Yes.



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax





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SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 1002 Name Victor1... Status Active

EE group 1 Regular State Em... Personnel ar HL34 Department of Health

EE subgroup UE Employee SSN 999-19-2500

Start 01/01/2005 to 01/31/2005

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason Misc Benefit Changes

Go to enrollment

Do you want to go to enrollment?

Yes

No

Cancel

11. Click 'Yes' to continue to the Benefits enrollment/HRBEN0001





## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

SAP

Enrollment

Enrollment Edit Goto System Help

Personnel no. 1002

ID number

Select

Pers. No. Name

56	Victor Newman
207	Diannette Carter
1000	Katherine Chancellor
1002	Victoria Newman

Enroll Victoria Newman on 01/01/2005 Overview

Offer selection

Possible offers	Enrollment period
Misc Benefit Changes	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

12. Double click on Miscellaneous Benefit Changes



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

Enrollment

Enrollment Edit Goto System Help

SAP

Enrollment

Direct selection Selection set

Enroll Victoria Newman on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Misc Benefit Changes	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Misc Benefit Changes

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Health Advantage POS		01/01/2005 - 12/31/9999	
QualChoice POS		01/01/2005 - 12/31/9999	
NovaSys POS		01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO		01/01/2005 - 12/31/9999	
NovaSys PPO		01/01/2005 - 12/31/9999	
High Deductible PPO		01/01/2005 - 12/31/9999	
Basic Life			
US Able (Basic EE Life ASE)		01/01/2005 - 12/31/9999	✓
Dependent Life			
US Able (Basic DEP Life ASE)		01/01/2005 - 12/31/9999	
Opt Dep Life			
US Able (Opt DEP Life ASE)			
Optional Life			
US Able-Opt EE Life ASE 1X/2X			
Opt Life Post			
US Able Opt EE 1x/2x Post Tax			

13. Double click on 'US Able Opt EE 1x/2x Post Tax' plan.

## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

The screenshot shows the SAP Enrollment system interface. At the top, there's a navigation bar with 'Enrollment', 'Edit', 'Goto', 'System', and 'Help' menus. Below this is a toolbar with various icons. The main window is titled 'Enrollment' and contains a 'Direct selection' window for 'Victoria Newman'. This window has tabs for 'Direct selection', 'Selection set', and 'Enroll'. The 'Direct selection' tab is active, showing details for 'Pers.No. 1002 Victoria Newman', 'Plan US Able Opt EE 1x/2x Post Tax', and 'Start 01/01/2005 - 12/31/9999'. There's a checkbox for 'Stop participation in period'. Below this is a 'Coverage' section with a table for 'Insurance option and coverage'. The table has columns for 'Insurance Optio', 'Basic Coverage', 'Additional Unit', and 'Insurance Cover'. The 'Basic Coverage' column has a dropdown menu with 'Optional Life ASE 1X SAL' selected. To the right of this window is a table for 'Enrollment period' with rows for '01/01/2005 - 01/31/2005' and '01/01/1800 - 12/31/9999'. At the bottom of the 'Direct selection' window is an 'Accept' button. A callout box points to the 'Optional Life ASE 1X SAL' option in the dropdown menu, with the text '14. Select 1X or 2X salary from the drop-down list.' Another callout box points to the 'Accept' button, with the text '15. Click on Accept'.

14. Select 1X or 2X salary from the drop-down list.

15. Click on Accept



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

Enrollment

Enroll Victoria Newman on 01/01/2005 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Misc Benefit Changes	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Misc Benefit Changes

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Health Advantage POS	0	01/01/2005 - 12/31/9999	
QualChoice POS	0	01/01/2005 - 12/31/9999	
NovaSys POS	0	01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO	0	01/01/2005 - 12/31/9999	
NovaSys PPO	0	01/01/2005 - 12/31/9999	
High Deductible PPO	0	01/01/2005 - 12/31/9999	
Basic Life	0		
US Able (Basic EE Life ASE)	0		
Dependent Life	0		
US Able (Basic DEP Life ASE)	0		
Opt Dep Life	0		
US Able (Opt DEP Life ASE)	0		
Optional Life	0		
US Able-Opt EE Life ASE 1X/2X	0	01/01/2005 - 12/31/9999	
Opt Life Post	0		
US Able OptEE 1x/2x Post Tax	0	01/01/2005 - 12/31/9999	✓

16. Click Enroll

Note: A check mark will appear for the plan to be added.



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

Enrollment

Direct selection Selection set

Enroll Name Victoria Newman on 01/01/2005 Overview

Personnel no.

ID number

Evidence of insurability

Selected plans for which insurability has been proven:

List of Plans

Pers. No.	Name	Selected	Plan	Option	Dependent	From	To
56	Victor Newman	<input checked="" type="checkbox"/>	US Able Opt EE 1x2x Po...	Optional Lif...		01/01/2005	12/31/9999
207	Diannette C...	<input type="checkbox"/>					
1000	Katherine C...	<input type="checkbox"/>					
10	Victoria Newman	<input type="checkbox"/>					

17. Click in the box

Note: Verify that you have selected the correct plan to be added.

18. Click Enroll

Enroll Select All Deselect All Cancel

Plan	From	To
US Able (Opt DEP Life ASE)	01/01/2005	12/31/9999
Optional Life	01/01/2005	12/31/9999
US Able-Opt EE Life ASE 1X/2X	01/01/2005	12/31/9999
Life Post	01/01/2005	12/31/9999
US Able Opt EE 1x2x Post Tax	01/01/2005	12/31/9999

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13

Note: The employee's optional life insurance coverage increases due to salary increase, insurability is already approved by US Able. Therefore, the Benefits Specialist would click the box next to the optional life post-tax plan.

## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

[illegible]

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14



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

Enrollment

Enrollment Edit Goto System Help

Name: Victoria Newman on 01/01/2005 Overview

Personnel no.

Enrollment completed successfully

Continue Confirmation

20. Click Continue

Costs	Undo selection	Status	Validity period	Activity
antage POS			01/01/2005 - 12/31/9999	
Novasys POS			01/01/2005 - 12/31/9999	
Blue Cross Blue Shield PPO			01/01/2005 - 12/31/9999	
Novasys PPO			01/01/2005 - 12/31/9999	
High Deductible PPO			01/01/2005 - 12/31/9999	
Basic Life				
US Able (Basic EE Life ASE)			01/01/2005 - 12/31/9999	✓
Dependent Life				
US Able (Basic DEP Life ASE)			01/01/2005 - 12/31/9999	
Opt Dep. Life				
US Able (Opt DEP Life ASE)			01/01/2005 - 12/31/9999	
Optional Life				
US Able-Opt EE Life ASE 1X/2X			01/01/2005 - 12/31/9999	
Opt Life Post				
US Able OptEE 1x/2x Post Tax			01/01/2005 - 12/31/9999	✓



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

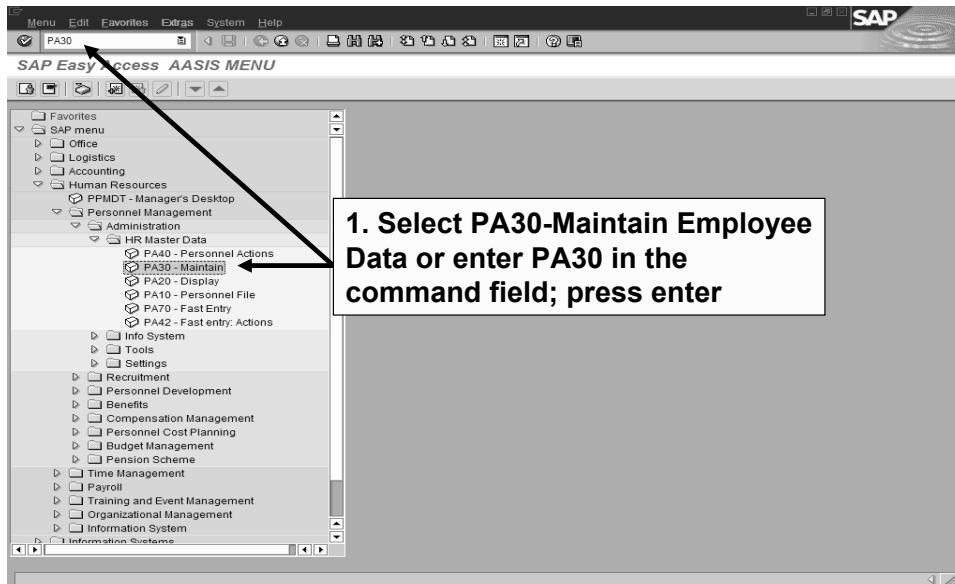
The screenshot shows the SAP HRBEN Enrollment screen. A callout box with the text "21. Click 'Back' until the User Menu appears" points to the back button in the navigation bar. The screen displays a list of personnel on the left and a table of possible offers on the right.

Pers. No.	Name
56	Victor Newman
207	Diannette Carter
1000	Katherine Chancellor
1002	Victoria Newman

Possible offers	Enrollment period
Misc Benefit Changes	01/01/2005 - 01/31/2005
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax





## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

The screenshot shows the SAP HR Master Data Maintenance interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master Data'. Below this, the 'Personnel no.' field is set to '1002'. To the right, organizational data is displayed: 'Pers. area' HL34, 'Department of Health', 'Cost Center' 627017, and 'OFM BAA0100'. A tabbed interface at the bottom shows 'Employment Issues', 'Career Management', 'Benefits', 'Payroll', and 'Taxes'. The 'Benefits' tab is active, showing a list of infotypes on the left: 'Infotype text', 'General Benefits Information', 'Family Member/Dependents', 'Adjustment Reasons', 'Health Plans', 'Insurance Plans', 'Savings Plans', 'Flexible Spending Accounts', 'Benefits Medical Information', and 'COBRA-Qualified Beneficiary'. The 'Insurance Plans' infotype is selected. On the right, a 'Period' selection area is visible with options for 'Today', 'A11', 'From curr. date', 'To current date', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. Below the list, a 'Direct selection' section shows 'Infotype' as '0168' and 'STy' as an empty field. Two callout boxes provide instructions: one points to the 'Change' icon (a double-headed arrow) above the personnel number, and the other points to the 'Insurance Plans' infotype in the list.

**24. Click change**

**23. Select the Insurance Plans Infotype under the Benefits tab.**



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

**25. Click 'Next record' icon until you find the Plan for US Able Opt EE Life 1x/2x Post Tax.**

The screenshot shows the SAP 'Change Insurance Plans' interface. At the top, there's a menu bar with 'Info type', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu, the title 'Change Insurance Plans' is displayed. The main area contains a table with employee data: Personnel No. 1002, EE group 1 (Regular State Em.), Personnel ar HL34 (Department of Health), EE subgroup UE (Employee), SSN 999-19-2506, Start 01/01/2005, and End 12/31/9999. Below this, the 'Plan' field shows 'BE01 US Able (Basic EE Life ASE)'. A tabbed interface at the bottom shows 'Plan data', 'Administration', 'Insurance cov.', 'Costs', and 'Beneficiaries'. The 'Plan data' tab is active, displaying 'General plan data' with fields: Benefit area (US State of Arkansas-US), Plan type (BLIF Basic Life), Benefit plan (BE01 US Able (Basic EE Life ASE)), and Insurance Option (BL01 Basic EE Life Coverage). Below this is an 'Additional fields' section with 'Original End Date' and an empty input field.



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

SAP

Change Insurance Plans

Personnel No 1002 Name Victor1... Status Active  
EE group 1 Regular State Em... Personnel ar HL34 Department of Health  
EE subgroup UE Employee SSN 999-19-2506  
Start 01/01/2005 to 12/31/9999 Chng 12/15/2004 D

Plan 0EP2 US Able Opt EE 1x/2x Post Tax

Plan data Administration Insurance cov. Costs Beneficiaries

General plan data

Benefit area	US State of Arkansas-US
Plan type	BLIF Basic Life
Benefit plan	BE01 US Able (Basic EE Life ASE)
Insurance Option	BL01 Basic EE Life Coverage

Additional fields

Original End Date

26. Click on the 'Insurance cover' tab.

Note: The Plan is US Able (Basic EE Life ASE)



## Post-Tax Optional Life Plan and Insurance Coverage exceeding \$40,000 Pre-Tax

The screenshot shows the SAP 'Change Insurance Plans' interface. Callout 28 points to the 'Save' button in the top toolbar. Callout 27 points to the 'Alternate Coverage' field in the 'Insurance coverage' section, which currently contains '25,000.00 USD'. Callout 29 points to the 'Back' button in the top toolbar.

**28. Click Save**

**27. Enter the amount of insurance which exceeds \*\$40,000 in the Alternate Coverage field.**

**29. Click 'Back' to go to the User Menu**

Personnel No.		Status	Active
EE group	1	Actor1...	
EE subgroup	UE Employee	SSN	999-19-2506
Start	01/01/2005	to	12/31/9999
Chng	12/15/2004	DLSCOTT	

Plan: 0EP2 US Able Opt EE 1x/2x Post Tax

Annual base salary		Calculation Date	01/01/2005
Benefit salary	24,410.00 USD		
Salary override	USD		

Insurance coverage	
Basic Coverage Amt	25,000.00 USD
Additional Units	0 X 0.00 USD
Insurance Coverage	25,000.00 USD
Alternate Coverage	USD

Additional fields  
Original End Date

21

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June '06, V5.0

*\*For example,* the employee's total amount of Optional Life coverage is \$48,000. Therefore, the amount that exceeds \$40,000 is \$8,000. The \$8,000 amount is entered in the Alternate Coverage field.

**Note:** The 'Insurance coverage' field will reflect the increase in optional life coverage. Therefore, the agency should subtract \$40,000.00 from the amount in the 'Insurance coverage' field and enter the difference in the 'Alternate Coverage' field.